PDF Creation Checklist
for NREL Standard PDFs Using Adobe Acrobat 6

PC Microsoft Word, Excel, and PowerPoint:

❑ Make sure to **select Adobe PDF as your printer** so that your document will be formatted for postscript PDF creation.
   o Though you can create a PDF without selecting Adobe PDF as your printer, the document will reflow based on the printer you have selected and you will not get consistent results.

❑ The Cancel button in the print dialog box changes to a Close button whenever you change a printer. Be sure to **click Close** after selecting Adobe PDF printer instead of OK or else the document will start to print through Adobe PDF printer instead of PDFMaker.
   o PDF creation through PDFMaker allows you to retain all interactive elements (bookmarks, links, etc.) that you have selected in your PDFMaker settings.
   o Interactive elements cannot be carried-thru when printing through Adobe PDF printer.

❑ Select **Adobe PDF > Change Conversion Settings**
   Settings Tab
   o Select StdWeb72, StdWeb150, or StdPrint
   o Select Prompt for Adobe PDF file name
   o Select Add links or Add bookmarks if desired
   o *Conditionally* select Enable accessibility *(See Make Accessible below)*
   Security Tab – leave everything unchecked.
   Word Tab - Select only options desired in resulting PDF. Selecting options that are not pertinent to your document unnecessarily slows PDF creation time.
   Bookmarks Tab - If styles and headings were used in the document, select appropriate levels of automatic bookmark generation as desired.
   Excel and PowerPoint - Slightly different tabs and options, select as appropriate

❑ Click the PDFMaker **Convert to Adobe PDF** icon or select Adobe PDF >Convert to Adobe PDF

❑ **Save** the file.

PC or Mac Adobe Products

❑ For Photoshop 7, Illustrator 10, Pagemaker 7, InDesign 2, Framemaker 7, GoLive 2, and Adobe Creative Suite (CS) products

❑ Use the Save As PDF or Export features directly from the application to create PDFs

❑ Create PDFs compatible with Acrobat 6 (PDF 1.5)
   o Select compatibility with Acrobat 4 (PDF 1.3) if pre-flattening of transparency is desired. Then open resave in Acrobat 6.

❑ As a general guideline, use either 72dpi or 150dpi with automatic (jpeg) compression

❑ Embed all Fonts

PC All Other Applications

❑ Select Adobe PDF as your printer.
   o☐ Verify Adobe PDF Properties – Select StdWeb72, StdWeb150, or StdPrint

❑ Click OK to print to Adobe PDF printer.

❑ Enter desired file name and location when prompted.

Mac All Other Applications

❑ Use the Adobe PDF printer to create PDFs from all other Mac applications.
❑ Do NOT "Save as PDF" from Mac OS10x. This produces quartz-generated PDFs which have known compatibility issues with certain PC environments.

Finalize PDF to NREL Standards

❑ First and foremost—Carefully **PROOF** the PDF!
  o Choose File >Document Properties >Fonts to verify that all **fonts are Embedded** or Subset.
    ▪ Times/Times New Roman, Arial/Helvetica, Courier or Symbol fonts are considered 'Base 14' fonts. These fonts generally fare well with Adobe's font substitution.
    ▪ Avoid subsetting when merging multiple PDFs together.
  o If all fonts are not embedded, then be sure to inspect for substitution impacts such as garbled/missing characters, or boxes for symbols. Select Advanced and make sure Use Local Fonts is unchecked. This forces substitution so you can view the effects of substitution.
  o Scroll through and LOOK at every page. Look for missing items from charts such as legends and axis titles which sometimes disappear due to layering inconsistencies in the Make Accessible function.
  o Look for PDF distortions, such as patterns and shading that differ from the native file; the pattern differences may affect the content intent.
  o Look for slow-loading graphics – usually a raster image with a transparent background or a chart with complex blends or patterns.
  o Links to a different drives will default to absolute links…make sure files reside on same network drives.
  o Select the Link tool and verify that all link boxes are in the appropriate places. Verify that link urls and files are valid.
  o Verify that bookmarks are valid and meaningful.
❑ Open the Pages panel and (conditionally) Embed All Thumbnails.
  o Embed thumbnails for documents that open to Pages Panel and Page.
  o Create bookmarks and open to Bookmarks Panel and Page for larger documents that exceed 16 pages or that contain a Table of Contents, such as technical papers and research reports. Do not embed thumbnails for documents that open to Bookmarks Panel and Page.
❑ Set Document Properties - **Initial View**
  o Set Initial View to either Pages Panel and Page or Bookmarks Panel and Page as appropriate
    ▪ Bookmarks Panel and Page for documents that exceed 16 pages and/or have a Table of Contents
    ▪ Pages Panel and Page for documents under 16 pages.
  o Set Magnification to Fit Page if document has a Cover or is a screen-sized presentation.
  o Set Magnification to Fit Width for all other documents
  o Set Page Layout to Single Page
❑ Set a **Page Action** if the document's first page is a Cover
  o Page Open action = Fit Page
  o Page Close action = Fit Width

- ❑ **Enter Meta field information** into the Document Summary window
  - ○ Enter Title exactly as it appears on the document
  - ○ Enter in the Subject field a summarized description of the document contents of at least 71 characters (including spaces), not to exceed 200 characters. The most important words should be in the first 150 characters.
  - ○ Optional meta fields
    - ▪ Author field – Remove the PDF creator's name if it was entered by default.
    - ▪ Keyword field – Fewer keywords are better. Separate keywords with semi-colons.
- ❑ Use the **Make Accessible** function for Section 508 compliance
  - ○ Save the untagged PDF prior to using this function.
  - ○ Select Advanced>Accessibility>Make Accessible.
    - ▪ If the procedure completes without an error, carefully review the PDF again for any new anomalies occurring from the process.
    - ▪ Possible errors include url links truncating at the pound sign and corrupt layer order on graphics and charts, so elements appear to be missing or covered by something else.
    - ▪ If there are anomalies which you are unable to repair or if the process produces an error screen, Revert back to the saved PDF.
    - ▪ These changes are irreversible, so be sure not to overwrite the previous file until you are certain the PDF survived the tagging process!!
- ❑ **Optimize** the PDF
  - ○ Quite simply, do Save As to re-optimize the file. Clicking Save only does incremental saves and unused objects are not removed.

Submit to Publications Services

Please remember that ALL PDFs being posted to external-view Websites containing scientific or technical information (and/or have an NREL or DOE/GO project number) are required to be submitted to IS Publications Services for processing, posting approval/release, and archiving. This includes submitting all native files as well as the PDF.

Updated May 2005